Common Transaction Form

(For existing unit holders only)

Distributor Name & ARN	Sub Broker/Branch Code	Sub-Broker ARN	EUIN	Date
J.M.Lal HUF ARN-264658			E495118	___/___/_____

Unit Holder Information

Folio :   Mode of Holding :

Scheme :

First Unitholder	Second Unitholder	Third Unitholder
Name	Name	Name
PAN No	PAN No	PAN No

Additional Purchase Request

I/We wish to purchase additional units in the scheme as per details given below :

Amount(Rs.) in Figure :   Rs. in Words :

Drawn On :   Cheque/DD No :   Date :   Branch :

Redemption Request

Please Redeem Amount (Rs.) in Figure :   Rs. in Words :

Or Units :   ☐ All Units

Switch/Transfer Request

Please refer to the offer document of the scheme you are switching from and to.

I Wish to Switch Rs.:   Or Units :

To Scheme :   Option: ☐ Growth   ☐ Div Payout   ☐ Div Reinvest

STP Request

From Scheme :

To Scheme :   Option: ☐ Growth   ☐ Div Payout   ☐ Div Reinvest

From Date: To Date:

☐ Fixed Transfer: Frequency :   Date :   Amount (Rs.) :   No of Installments :

☐ Capital Appreciation STP: Frequency :   Date :

SWP Request

From Scheme :   Amount (Rs.) :

From Date: To Date: Frequency :

☐ Kindly STOP the SIP / SWP of Rs. _____ dated _____ of each month with IMMEDIATE effect.

☐ Kindly STOP the STP to _____ with IMMEDIATE effect.

☐ Kindly change the broker/ARN to

☐ Please update the PAN / KYC in your records:

☐ Please update my Mobile No _____ and Email ID _____

Update/Change Bank

Bank Name :   Branch Address :   A/C No. :

MICR :   IFSC Code :   Type :   Pin Code :

Nomination   I/We wish to nominate/change nominee as under :

Name and Address of Nominee(s)	Date of Birth	Name & Address of Guardian	Signature of Nominee(Optional)/ Guardian of Nominee(Mandatory)	Proportion (%) in which the units will be shared by each Nominee (Should aggregate to 100%)
Nominee 1	(to be furnished in case the nominee is a minor)			

All Applicants must sign in case of joint holding.

1st Unit Holder		2nd Unit Holder		3rd Unit Holder	